

## FY13 Evaluation Memo Draft – 8/19/13

The Select Board has completed its annual review of your job performance for this third year of your service as Town Manager, and we are pleased to present these results to you.

This memo and the attached composite ratings grid serve as your official performance evaluation for FY13. These documents summarize all the ratings from the individual evaluation forms submitted by all five Select Board members, and the comments on points where we have broad agreement. Each member's form is also included for your information, but because our authority is vested in the full body, only the composite documents represent the Select Board's position

We thank you for your assistance with this process as we have tried to call out and express appreciation for the parts of your work that have particularly shined this year, as well as to assist you by identifying areas that need more of your attention. The goal, as always, is to seek continual improvement in the management of Amherst's Town government and administration.

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This was another good year under your leadership as Town Manager. The categories below outline the many fine strengths and the couple of challenges marking your third year in this position.

### **Fiscal Management**

Once again, you received stellar ratings – **100% Commendable** – on all aspects of the Town's budget preparation, conformance to the Select Board's Budget Policy Guidelines, and administration of the adopted budget. For the four-part performance goal, you earned 80% Satisfactory or higher on all parts, with **100% Commendable** for efforts to reduce expenses, with pursuit of grants and moving retired teachers on to the Health Claims Trust Fund cited as important successes. We note that this is an incredibly valuable strength of yours and of your staff, and that Amherst is well-served by it. Many other communities are not nearly so fortunate.

### **Relationship with the Board and Town Meeting**

This also remains an area of strength, much appreciated by the Select Board. Professional recommendations on issues requiring our input, and your interpretation and execution of Select Board policy were rated 100% Satisfactory or higher, while your professional and impartial working relationship with us and your presentations to Town Meeting earned the highest possible ratings of **100% Commendable**. For the five-part performance goal about keeping the Select Board informed, rankings were positive in all areas – **80% - 100% Satisfactory or**

**higher** in four categories, 60% Satisfactory or higher in one. Called out for appreciation were your use of press releases, keeping the Select Board and the community informed about emergency and public health situations, and your status updates on collective bargaining negotiations.

Comments here and sprinkled throughout the forms also expressed concern about a few issues we weren't kept apprised of or didn't have the opportunity to provide feedback on, with reuse plans for the basement of the North Amherst School, and the status of efforts to preserve affordability at Rolling Green cited. A common theme was that the information we are receiving is good and much appreciated – and that more of it would be better: more frequent status updates and on a wider range of issues, broadcast to the full Select Board.

### **Long Range Planning**

Staying informed about new systems and technologies and the performance goal about making Amherst a greener and more sustainable community both received of **100% Satisfactory or higher**. Noted with appreciation for technology elements were the Town's web site, downtown WiFi and the new Open Checkbook; and for green initiatives, they included: the multi-year tree planting, LED streetlights and the planned solar array.

The performance goal about creation of a staffing plan earned mixed marks – 60% rated it satisfactory, citing some progress on the effort; and a majority indicated via ratings and comments that more progress is required.

The biggest concern in the long-range planning area is the lack of a building assessment document. Now in its third year as your performance goal – and having been carried over as an unaddressed need from your predecessor, rankings were 80% Needs Improvement or Unsatisfactory, and 20% Unable to Judge. With the East Street School sitting empty and the North Amherst School having had a use change in the basement that is noted as a concern to the Select Board, and with the competing needs for precious capital dollars, the absence of this plan is being felt sharply. The lack of any visible substantive progress here is disappointing.

### **Staff and Personnel Relations**

Ratings in this category are generally high, with four of the five annual expectations receiving ratings of at least **80% Satisfactory or higher**, and calling out excellent hiring practices, improvements to the Human Resources function, and the new opportunities for professional development as great successes. The performance goal about the Human Resources assessment – a long-standing Select Board priority – earned praise and a rating of **100% Satisfactory** or above. Here and in other places, your handling of and success with union contract negotiations is noted with appreciation.

The one area of concern, just as it was last year, was staff morale issues. The Select Board recognizes how difficult it is to for us to assess this and how imprecise a tool our staff feedback

questionnaires are, however, there are consistent indicators of some staff in some departments feeling and perceiving low morale and poor communication, and no indicators of steps being taken to address that. Certainly, the HR improvements and professional development opportunities play a role in improving staff morale; and certainly, ongoing concerns by some about pay equity, to be addressed in the upcoming compensation study, account for some dissatisfaction. However, we keep hearing that some staff have little communication and less interaction with you, and that is not consistent with the Select Board's stated goal of making high staff morale a priority, with efforts to include increased communication. The ranking for developing good staff morale was 80% Needs Improvement and the ranking for the communication part of the two-part staff morale performance goal was 40% Needs Improvement and 20% Unable to Judge. This remains an area that requires your increased attention.

### **Community and Intergovernmental Relations**

High marks in this category as well, with **100% Satisfactory or above** for your spokesperson skills and maintaining knowledge of developments in other jurisdictions and at our institutions of higher ed. The performance goal about strengthening relationships with the University and colleges and mitigating for off-campus impacts was entirely positive, with **80%-100% Satisfactory or better** in all facets. The performance goal about creating recommendations to improve health, safety and quality of life in the neighborhoods earned **100% Satisfactory or higher**. Comments on both called out for special praise your Safe and Healthy Neighborhoods Working Group initiative, which led to approval of the Rental Permitting bylaw at Town Meeting; your successful negotiations with the University to provide additional ambulance support and joint police patrols; and your support for the Town-Gown study. Other related issues cited with appreciation here and other places include support for traffic-calming speed humps and expansion of the Saturday Farmers Market.

There were two areas of concern noted in this section. One was in the area of ensuring employee helpfulness, courtesy and sensitivity to public perception. While this question received a 60% Commendable ranking, comments here and in other places expressed concern about the timeliness of your (and sometimes, other staff's,) replies to e-mails and phone calls from the public, how some inquiries receive no follow-up response, and the troubling perceptions that creates. This was a concern in the past as well, and shows scant progress. While the Select Board tries to concentrate on "what" we expect from you, rather than "how" we want you to achieve it, in both this area and with staff morale, our individual comments include a variety of suggestions that you might consider.

The second area of concern was related to support for affordable housing. The performance goal about supporting the creation of additional housing for those with low incomes received a 60% rating of Satisfactory of above. Many noted that your support for Olympia Oaks, your efforts with Echo Village among other work to support and maintain affordable units was exemplary. However, the handling of the Rolling Green situation and its impacts on our Subsidized Housing Inventory numbers was identified as a major concern.

## General Expectations

Positive comments here highlighted your enthusiasm for this work, community spirit, your professional demeanor and calm leadership style, good listening and speaking skills, strong advocacy and skilled crisis management.

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## FY13 Performance Goals

The performance goals established for FY13 were incorporated into the appropriate sections of the evaluation form and above. (Two goals ended up in the wrong section of the evaluation form, as noted in the composite, but that was corrected for this memo.) The full rating results are below, with **bold** identifying areas of particular strength and *italics* identifying areas requiring more attention.

Goal #1: Fiscal management:

- 1a) New revenue: 100% Satisfactory or above**
- 1b) Reducing expenses: 100% Commendable**
- 1c) Fair and responsible contract negotiations: 80% Satisfactory or above
- 1d) Increased economic development profile: 80% Satisfactory or above

Goal #2: Strengthening Relationships with UMass and colleges

- 2a) Mitigating impacts of large student population: 100% Commendable**
- 2b) Compensating for non-taxable property: 80% Satisfactory or above
- 2c) Pursuing issues of mutual interest: 100% Satisfactory or above**

Goal #3: **Engage the community on successes and challenges: 100% Satisfactory or above**

Goal #4: Make high staff morale a priority

- 4a) *Increasing communication with staff: 40% Needs Improvement/20% Unable to Judge*
- 4b) Encouraging positive workplace culture: 80% Satisfactory or above

Goal #5: **Assess Human Resources needs: 100% Satisfactory or above**

Goal #6: Keep Select Board informed

- 6a) Responding to/initiating improved communication: 100% Satisfactory or above**
- 6b) Recognizing issues appropriate for SB feedback: 60% Satisfactory or above
- 6c) Allowing SB opportunity for feedback: 80% Satisfactory or above
- 6d) Involving SB in collective bargaining strategies: 100% Satisfactory or above**
- 6e) Informing us before things are in newspaper: 80% Satisfactory or above

Goal #7: *Town building assessment: 100% Needs Improvement/Unsatisfactory/Unable to Judge*

Goal #8: **Make Amherst greener community: 100% Satisfactory or above**

Goal #9: *Recommended staffing plan: 60% Satisfactory*

Goal #10: *Support creation of affordable housing: 60% Satisfactory or above*

Goal #11: **Recommendations for neighborhood safety/quality of life: 100% Satisfactory or above**

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### **Evaluation Process Information**

This document summarizes all Select Board members' individual evaluation forms, with comments reflecting majority and general sentiments reflected on those forms or agreed upon during discussion at the August 19th Select Board meeting [*Note to SB: this is still a draft and obviously doesn't yet include comments from 8/19.*] Informing the Select Board evaluations are: our personal observations, impressions and interactions throughout the year; feedback received informally during the year from staff members and members of the public; and feedback received through formal solicitation during the evaluation process. This year, Staff Questionnaires were sent to 220 staff members, and 28 were returned. In response to soliciting comment from committees, Town Meeting members and the general public, we received 9 submissions.

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### **In Conclusion**

Every member of the Select Board appreciates working with you and admires your fine service to our community. We look forward to your continued success in so many critical areas of Town management, and we look forward to the progress and new successes you will achieve by addressing a few areas that need more of your attention. It remains our pleasure to work with you and we thank you for another good year.